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MASTER FILE

DSSD CENSUS 2000 PROCEDURES AND OPERATIONS MEMORANDUM SERIES
#EE-3

MEMORANDUM FOR Michael Longini
Chief, Decennial Systems Contract and Management Office

Attention: Ed Wagner
Decennial Systems Contract and Management Office

From: Howard Hogan Howard Hogan
Chief, Decennial Statistical Studies Division

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Decennial Statistical Studies Division

Subject: Observation of Inbound Telephone Questionnaire Assistance at
PRC in Margate, FL

I. Introduction

I traveled to Margate, FL on April 3 and 4 to observe Inbound Telephone Questionnaire Assistance (TQA). The purpose of the trip was to observe agents fielding customer questions and the methods used to resolve customer concerns. I observed Quality Assurance (QA) agents and the methods used to monitor the performance of agents and the feedback provided once a call was complete.

II. Observations and Comments

A. Tour of Facilities

On Monday April 3, I arrived at the PRC facility and was given a tour of the operation. I observed agents on the "call floor" fielding customer questions and the QA agents monitoring the calls to ensure proper resolution.

B. Quality Assurance

After my tour of PRC, I was taken to the QA monitoring area and introduced to the QA staff. The QA room was isolated from the agents to ensure monitoring was unbiased and thorough. The QA agents and their supervisors were the only individuals allowed in QA monitoring room. After a brief description of the QA procedures, I was given a phone headset to monitor incoming calls. The workload of calls had dropped considerably since April 1. The operation was not as hectic as it had been in previous weeks. This allowed the QA agent to thoroughly explain the method he used to access the quality of an agent's call resolution.

After an agent completes a call, the QA agent rates the quality of the resolution based on several call attributes and assigns the agent a score for the resolution. Once the score has been determined, the QA agent proceeds to the "call floor" and provides immediate feedback on the previous resolution. The positives of the resolution are emphasized while the QA agent reminds the agent to adhere to the call guidelines. Later in the day I observed some of the Spanish QA monitoring.

The QA monitoring seemed to work well. The agents as well as the QA monitoring staff understood their responsibilities and performed them to the best of their ability. The process of providing immediate feedback allowed the QA agents to correct any inconsistencies in call resolution and continually remind the agents to adhere to the call guidelines.

Most of the monitoring was flawless but there were some problems. The QA agents indicated a search engine, Question Reference Book (QRB), was supposed to be available to them. This search was supposed to allow them to look up various types of information. The QA agents indicated this functionality was never present. On occasion when the QA agent attempted to connect to an agents call, the QA agent was connected to the wrong agent. Since the QA agent needed to perform a quality check on a particular agent, an opportunity was missed and the QA agent had to wait until the agent fielded another call before they could be monitored. Another problem was the CASE ID numbers would not always match the call the QA agent was monitoring. The QA agent had to enter the correct CASE ID to prevent an error in monitoring.

The call attributes the QA agents used to score agents would sometimes overlap. For example, one of the attributes stated, "Agent answered the callers primary question within the bounds of existing Operator Support System (OSS) script" and was assigned a weight of six. Another attribute stated, "Answered questions using verbatim OSS (including form questions, Frequently Asked Questions, form request, QRB, etc.) responses" and was assigned a weight of ten. Some of the agents would choose to only discount the agent for one of the questions (many times the lower weight) and not penalize them twice for the "same" error. On occasion this may have inflated some of the agent scores but I do not think it necessarily posed any real problem.

The scoring for the call attributes did not always make sense. In one instance I observed an agent collect an incorrect address (based on what I heard the caller indicate). The agent received a score of 93 which I thought was high considering the caller requested a form be sent to their address. The form will never arrive because the address collected was incorrect.

Later in the day, I monitored some of the Spanish calls. My Spanish is rusty but I was able to get the gist of most caller inquiries. Most of the callers had difficulty determining race. When they looked at the form, they saw a mix of skin color (black, white) and nationality (Chinese, Pacific Islander). The callers were unsure where they fit since they were Americans and their skin color was neither black nor white. The callers would often ask the agent what they should answer. The agents did a good job of staying neutral and encouraging the callers to answer the race category as they saw fit.

Near the end of the day, the supervisor asked if I would like to sit on the "call floor" and observe the calls first hand. I declined because when I accompanied the QA agents on their resolution feedback, the agents were definitely affected by my presence and seemed a little unnerved. I felt my presence might hinder the call resolution process and lower the scores of those individuals that were nervous. I spent the rest of my time at the call center reviewing reports the QA supervisors produced on a daily and weekly basis.

III. Conclusion

The TQA facility was well run and most of the operations went smoothly. The process of providing immediate feedback allows any errors to be corrected immediately and reinforce the call guidelines throughout the operation. My only reservation was that an agent could collect the wrong information but still receive a relatively high score on call resolution. Data collection, especially by phone, is critical and an error in data collection should have a larger impact on an agents review. The trip was a very rewarding and enjoyable experience.

Attachment

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Attachment

INBOUND TQA GENERAL PRODUCTION CHECKLIST OF CENTER ACCOUNTABILITIES AND PERFORMANCE MEASUREMENTS

CENTER **PRC Margate, FL**

DATE **April 3-4, 2000**

OBSERVER Jerry D. Imel

Center Accountabilities/ Performance Standard	Meets Standard	Does Not Meet Standard	Comments
Auto Focus Scan Forms are always completed by QA Reps when monitoring agents.	Yes		
Agents and their supervisors are consistently given feedback by QA Reps after monitoring sessions.	Yes		
Calibrations sessions are held by QAR Supervisors for all QA Reps.			Did not observe activity
Agents use OSS to enter data for form requests.	Yes		
Agents use OSS to complete survey forms.	Yes		
Agents use OSS to answer caller questions.	Yes		
Bi-lingual agents are proficient in English as well as the 2nd language.	Yes		
Agents and other staff that have access to Title 13 data are all sworn in.			Did not observe activity

Center Accountabilities/ Performance Standard	Meets Standard	Does Not Meet Standard	Comments
Supervisors are observed to be actively assisting agents, conducting at-station call observations, answering questions and handling escalated calls when necessary.	Yes		
EDS monitoring spreadsheet is used for QA monitoring schedules, tracking performance scores, agent classifications and agent status reporting.			Did not observe activity
Center management is knowledgeable about TQA requirements and facilitates observer.			Did not observe activity